

**GRAD-PG: Greek-Member Relationships and Development – Post-Graduation**

**An Honors Thesis (HONR 499)**

**by**

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## Abstract

This thesis discusses trends of skills and habits gained by members of Greek Life during their undergraduate years. The prevalence of the same skills and habits are discussed for members of Greek Life post-graduation. Finding evidence for skills dealing with money, time, and personal management in the post-graduate Greek Life community, this creative thesis constructs an organization to nurture and build upon this skill set. The created organization is named Greek-Member Relationships and Development – Post-Graduation (GRAD-PG) and is tasked with fostering a community in which Greek-Life graduates will expand upon previously learned skills of community volunteering, philanthropic giving, and personal developing. The second half of this thesis serves as a template and guide book to establish the organization. Concise instructions dictating how to establish GRAD-PG as a nonprofit incorporated organization along with forms needed to do so are included. The appendixes of this thesis contain the Constitution and Bylaws for GRAD-PG along with two sample personal development workshops.

## Acknowledgments

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### **Process Analysis Statement**

To conduct and carry out this creative thesis, I first started with the idea of a post-graduate organization for members of Greek Life. I did not know exactly what the organization would look like or what it would be called, but I knew I wanted it to center around volunteer work, philanthropic work, and personal or career development. Through my own personal time in Greek Life, these are the skills I have gained and want to continue using in my post-graduate career. I assumed other graduates of Greek Life had gained similar skill sets and habits, however I had not yet done any research on the topic.

After meeting with my advisor, Kevin Carey, and explaining my idea of the post-graduate organization to him, he suggested I first conduct a literature review to assess if the skills I gained from Greek Life are the norm for most Greek Life graduates. After consulting research articles and university Greek Life reports, I concluded members of Greek Life do leave college with a unique skill set of volunteering, giving, and growing. I then began to research how these skills affect a member after they graduate, how they carry over into their careers and post-college lives. After not finding much research in this area, I realized a post-graduate organization like the one I had been creating in my head is needed and would be well received by the post-graduate Greek Life community.

This is when I began to really form the organization not only in my head, but also on paper. I began to dictate exactly what the organization would entail, how members would build upon skills learned while in college, and how the organization would function. I drafted a constitution to outline all matters of the organization and membership requirements. Along with creating a constitution, I constructed sample membership development programs for the organization to utilize. The making of the constitution came from my understanding of how



organizations function from my time in Greek Life, ideas I wanted to be sure were implemented in the organization, and policies I intended members to abide by. Personal development program ideas came from what I learned about program development and education during my time serving as Vice President of Programming and Education in my own Greek chapter. While serving in this role, I learned how to structure educational programs, what kind of information to include, and how to make a program interactive; I tapped into these skills to create sample programming for this organization.

Around this time, I also began to start the process of creating a name. I knew I wanted to work with some type of acronym, an easy way to identify the organization while communicating its main interests. After careful consideration and a lot of scribbles on notebook paper, I landed on Greek-Member Relationships and Development – Post-Graduation, GRAD-PG for short. I liked how this clearly stated the most important aspects of the organization: 1) it would be for Greek Life Members after graduation and 2) it would center around relationships and development of the community or of one's self. From this point on, the project seemed to fall into place. I found guidelines from the Indiana government on how to establish a nonprofit organization and made sure to include those specific instructions for anyone interested in starting a GRAD-PG chapter. All of the boxes I had in my head were lining up and I could see GRAD-PG playing out in communities with Greek Life graduates. I was enthused to see GRAD-PG not only come into fruition on paper, but to also imagine where it could go and how it could change communities and graduates of Greek Life for the better.

## **Introduction**

When attending college, students are provided numerous opportunities not previously available to them. They live in new spaces with new people, are introduced to new ideas, and begin to make critical decisions for themselves. Along with this comes the opportunity to join many clubs and organizations on their college campus. By visiting a college activity fair, it is easy to see there is no shortage of clubs to get involved in at the college level. On most campuses, one type of organization stands out: Greek Life Organizations.

Whether it is from parents, older siblings, or friends who have been involved, headlines on the news, or stories in the movies, most freshman have heard of Greek Life. While the knowledge of Greek Life is world-wide, rates of participation vary tremendously across the United States. Student participation in Greek organizations ranges from moderate participation, such as 16.17% undergraduate Greek enrolment at Ball State University, to extremely high percentages of the student population, such as 71% undergraduate Greek enrolment at DePauw University (Ball State University Office of Greek Life, 2017 & DePauw University Campus Living & Community Development, 2016). Students who do chose to become members of Greek organizations help to shape their chapter's culture, demographics, and statistics.

Research and campus community statistics have shown the impact Greek Life can have on one student's life and on the campus as a whole. Through analyzing the impact of Greek organizations on members' academics, personal growth and development, community volunteering, and philanthropic giving, I aim to discover how Greek affiliation affects a person's life after college. With information about how Greek Life can impact members' lives once graduated, I will develop a post-graduate organization for Greek Life affiliated people dedicated



to the betterment of their communities and themselves through charitable giving, community volunteering, and personal development.

This thesis will provide context for why this kind of post graduate community is needed, what its members will benefit from, and step by step resources to create the organization. Working as a how-to-guide to create the organization, the product of this thesis will serve anyone wishing to create such an organization as a template to get their group operating. Along with the backbones to begin the organization, additional appendixes to this thesis will serve as the organization's constitution, bylaws, and sample personal development programs.

## **Impact of Greek Life While in College**

### **Impact on Academics**

Since their origin, Greek organizations have been dedicated to academic success. Beginning in the late 1700's with creation of Phi Beta Kappa at the College of William and Mary, fraternal groups have centered their existence around college and university life (Torbenson & Parks, 2009, p. 15). Men's fraternities continued to flourish on the east coast and as women began enrolling in higher education, women's societies were created. Women's organizations mimicked the fraternal organizations already in place and aimed to advance women's positions on campuses through working together in male dominated institutions (Torbenson & Parks, 2009, p. 22). Today, we still see a focus on academics in Greek organizations on collegiate campuses. A majority of Greek organizations publish their values and mottos, showing how most mention a value of scholarship or academic success.

A 2013 study titled *Greek Organization Membership and Collegiate Outcomes at an Elite, Private University* assessed the difference between academic success, retention, and graduation rates of non-Greek and Greek students. The study concluded, "Greeks exhibit slightly

higher GPA's in comparison to non-Greeks" (Walker, Martin, & Hussey, 2015, p. 219).

Statistically, the grade point average for Greek students was consistently higher than the grade point average of non-Greek students for all four years a student attended college. The fourth year GPA was highest for both groups, with Greek students receiving a mean of 3.54 and non-Greek students a mean of 3.48 on a 4.0 scale (Walker et al., 2015, p. 216). The study also found 94% of Greek students maintained full-time status through their four years while 87% of non-Greek students did the same. Additionally, 99% of Greek students completed their degree at the university's, compared to 94% of non-Greek students (Walker et al., 2015, p. 216). Researchers and authors of the study stated the following:

Fraternity or sorority membership leads to ... greater satisfaction with campus social life, and higher graduation rates. By encouraging active involvement in campus life, Greek organizations can serve as a beneficial resource to members, and serve as a model of broader efforts to maximize student retention and degree completion. Further, a visible Greek system likely encourages an active and supportive alumni base beyond the college years (Walker et al., 2015, p. 219).

Ball State University (BSU) Office of Greek Life (OGL) published a Greek Life report this past semester including academic statistics, displaying similarities to the findings of *Greek Organization Membership and Collegiate Outcomes at an Elite, Private University*. For the fall semester of 2016, the OGL published the all Greek average GPA to be 3.046 while the all BSU average was 2.983. Additionally, BSU retention rate of freshman students from fall of 2015 to fall of 2016 was 81.35%, while the Greek Life retention rate of freshman members for the same time period was almost 10% higher, 91.24% (Ball State University Office of Greek Life, 2017).



It is clear involvement in Greek Life during college does impact members' academics and time spent in college positively. Not only do members of Greek Life show consistently higher GPA's than their non-Greek counterparts, but also impacts their retention and graduation at the university. Higher GPAs for Greek Life members can lead to better post-graduation development outcomes, such as admittance into graduate school. In addition, higher retention rates of Greek Life members can correlate to higher chances of graduates working in a specific field or loyalty to a specific company once graduates pursue careers. Higher rates of retention in college can also lead to Greek Life graduates remaining in specific communities or town if they relocate for their career.

### **Impact on Personal Growth and Development**

Fraternities and sororities market themselves as places for students to develop skills of leadership, time management, and personal growth. Offering students the opportunity to allocate and oversee large budgets, recruit members to ensure continued success, and manage public relations and appearance, sororities and fraternities give members a glimpse into what their lives after college could entail. Through assuming the responsibilities of being in and managing a Greek organization, members develop skills and grow through the membership programs and leadership opportunities offered.

Wesley Routon and Jay Walker (2016) found higher rates of involvement in campus activities and leadership positions for Greek Life affiliated students when compared to their unaffiliated peers. They noted, "Greek membership is associated with higher student-government participation rates ... Greek Life appears to encourage students to join additional student organizations" (Routon & Walker, 2016, p. 62). The act of being in multiple organizations and holding leadership positions lends itself to the opportunity to gain more skills useful for the work

force, interact with peers and advisors to make meaningful networking connections, and allow the student to develop a sense of purpose when contributing to the greater good of the organization. After surveying over 100,000 students across more than 450 campuses, the same study found fraternity members “report improvements in their general knowledge, leadership abilities, interpersonal skills, public-speaking skills, knowledge of other ethnicities/cultures, ability to get along with those of other backgrounds, understanding of community problems, and understanding of national social problems” (Routon & Walker, 2016, p. 64). With a heightened ability to assess community problems and tap into useful leadership abilities, Greek Life college graduates can and should take these skills and utilize them to improve themselves, their peers, and the community around them.

These skills acquired through Greek Life follow a student through their career and personal relations, shaping how they interact with coworkers, employees, and all people around them. Through the environment and activities Greek Life offers, members grow in a wide area of personal, social, and leadership skills when compared to their non-Greek affiliated peers. However, after graduation, do members continue to work on these important skills? Are they immersing themselves in organizations to build upon their foundation, or are graduates coasting by in their post college communities?

### **Impact on Community Service**

A core value for many Greek Life organizations is giving back to the community and volunteering. Incorporated in their public values or creed, fraternities and sororities often mention the importance of members giving of their time to their community or country. In a study to assess college students' involvement in community service, researchers gathered data from 3 different groups of student: students involved in alternative spring break trips, students



affiliated with Greek Life, and students who did not participate in an alternative spring break trip or in Greek Life (Perry, Osbaldiston, & Henning, 2014, p. 727). Researchers used the Community Service Attitudes Scale (CSAS), a questionnaire with 10 subscales and a seven-point Likert scale to collect data from the three groups. When asked if they had participated in community service in the last year, 94% of the alternative spring break group replied they had, 95% of the Greek Life group replied they had, and 41% of the non-alternative spring break and non-Greek affiliated group replied they had (Perry et al., 2014, p. 727). The study also found “alternative break participants scored statistically significantly higher than did the uninvolved group on nine of the 10 subscales. Similarly, the Greek participants scored in between the alternative break and uninvolved participants on eight of the 10 subscales” (Perry et al., 2014, p. 728). In this study, Greek Life members are shown to volunteer more than their average classmate.

While Greek Life affiliated students are not consistently outperforming students who have participated in strictly service based organizations or alternative spring break trips, they do score significantly higher than their unaffiliated and non-alternative break peers when it comes to community service. These statistics can be credited to the members’ commitment to an organization which values giving back and engaging with the community, along with requirements for a certain number of hours logged participating in community service mandated by their individual chapters. Learning the importance and value of giving of their time in college can result in members continuing to serve their post-graduate communities and neighborhoods well into their adult years. Graduates of Greek Life have already gained the habit of volunteering, the next step is to plant themselves in communities and organizations which will push them to continue giving of their time and services.

### **Impact on Philanthropic Giving**

On the national level, Greek organizations often have an entire branch of their non-profit devoted to the management of the fraternity or sorority's foundation budget and giving opportunities. Foundations tend to support the organization's national cause, student leadership initiatives, and academic scholarships for members. To raise money, national foundations will sometimes launch campaigns directed at alumni or aid individual chapters in creating their own philanthropic events. Some national organizations dictate what philanthropic cause chapters will raise money and awareness for, while others leave the decision up to individual chapters and what it meaningful to their members.

On Ball State's campus, each Greek organization will hold anywhere from one to three philanthropy events per academic year. In an effort to raise maximum dollars for their organization's foundation, members carefully plan and market philanthropy events to be engaging, and awareness focused. Often engaging the campus in a week of events preceding their weekend philanthropy event, fraternity and sorority members can be seen selling event t-shirts, passing out event informational flyers, and educating the student body on their philanthropic cause. During the fall 2016 semester, the Ball State Office of Greek Life reported a total of \$86,623.47 raised by Greek Life organizations, bringing the total amount raise for all of 2016 to \$269,405.95 (Ball State University Office of Greek Life, 2017).

Relying heavily on participation from other Greeks, many philanthropic events are attended by members of other Greek organizations. With the support of the Greek community, their national foundation, and the campus community, Greek organizations' philanthropy events flourish and raise incredible amounts of money for each individual cause. One example of true teamwork and dedication to a philanthropy is the annual February Dance Marathon event held by



Ball State's Dance Marathon organization. Dance Marathon is an event put on every year where dancers (participants) raise money for Riley Hospital for Children in Indianapolis leading up to the event. Then, on the night of the marathon, dancers stand, dance, jump, and sing for 12 hours straight. During this time, they also hear personal stories of children who have been treated at Riley Hospital for Children

While the event is not currently run by a Greek Life chapter, it began on Ball State's campus as an event planned by Phi Mu and Sigma Alpha Epsilon in 2003. The event continued under Phi Mu and Sigma Alpha Epsilon's direction until 2008, when both chapters decided it would "best thrive as a student organization" (Ball State University Dance Marathon). Greek Life continues to heavily participate in Dance Marathon, pairing chapters together to supporting a "Riley Kid" at the marathon with presents and matching shirts. Dance Marathon has a specialized committee formed to recruit members of Greek Life to participate and to educate them on what Dance Marathon does. In total, since the organization's beginning on Ball State's campus, Dance Marathon has raised over \$1.2 million dollars for Riley Hospital for Children (Ball State University Dance Marathon). With being the original creators of Dance Marathon at Ball State and continuing to contribute and donate to the organization, Greek Life has played a key role in this campus wide philanthropy initiative. Greek Life members graduate knowing the importance of philanthropy and helping organizations raise money for a noble cause; they understand how to host events, recruit sponsors, and raise money. The step for them to make after gradation is to find clubs and organizations which will continue to build upon their philanthropic work skills.

## **Impact of Greek Life After College**

### **Impact on Career and Life-Long Skills**

While the impact of Greek Life on members in college is regularly assessed by the Greek and campus communities, research in the area of impact post-graduation has not been equally explored. It is understandable with its high impact on members while in college, Greek Life, and the skills learned while participating in Greek Life, would carry over into the professional and daily lives of post-collegiate members. Members of Greek organizations often express developing skills of leadership, time management, money management, and interpersonal relations. All of these traits can contribute to a member's post-graduate plans, whether it is to pursue a career or continue their education.

In a study titled *Undergraduate Greek Leadership Experiences: A Proven Method for Gaining Career Related and Life-Long Skills*, Greek Life advisor Katherine Sermersheim surveyed 190 Greek Life leaders who had graduated in the past three years. Responding to the survey, 95% of participants categorized their undergraduate Greek leadership position as "highly beneficial" to "extremely beneficial" along with identifying themselves as "prepared" to "extremely prepared" for their profession as a result of Greek leadership experiences (Sermersheim, 1996, p.57). Sermersheim related the study to Chickering's theory of how students develop. "Chickering suggests that students develop by progressing through seven tasks ("vectors"). Changes in self-awareness, skills, and attitudes come with each task and stimulation from the environment is necessary for growth to occur" (Sermersheim, 1996, p. 58).

Chickering's seven vectors are as follows:

1. Developing Competence (intellectual, physical and manual, interpersonal; leads to sense of self confidence)
2. Managing Emotions (both positive and negative emotions)



3. Moving through Autonomy toward Interdependence (independence from family and peers, responsible for self)
4. Developing Mature Interpersonal Relationships (tolerance and appreciation of differences; capacity for intimacy)
5. Establishing Identity (integration)
6. Developing Purpose (direction for the future)
7. Developing Integrity (values) (Chickering & Reisser, 1993).

In her research, Sermersheim found students' responses to survey questions displayed members and leaders in Greek Life passed through each of these vectors, showing high level skills acquired and their impact on members' post graduate plans (Sermersheim, 1996, p. 58-59). An example of a student passing through Vector Three is shown when a student replied, "the most beneficial experience I had as a Greek leader was being a delegate at my international convention. This gave me a chance to travel by myself ... for a week and it gave me a voice for my chapter in all matters at hand" (Sermersheim, 1996, p. 58). Greek Life and leadership opportunities give members the chance to work independently, speak and act on behalf of their chapters, and learn what taking responsibility for self, others, and an organization looks and feels like.

Pairing with Purdue University, the National Panhellenic Conference, and the North-American Interfraternity Conference, Gallup published a research study looking into effects of Greek Life participation on work involvement, community involvement, and emotional well-being when compared to non-Greek peers. Findings show "43% of fraternity and sorority members who are employed full time for an employer are engaged in the workplace, compared to 38% of all other college graduates" (Gallup, 2014, p. 7). Gallup also noted fraternity and sorority members show higher signs of well-being compared to non-Greek graduates. The areas of assessment included purpose, social, financial, community, and physical well-being. Greek graduates showed a higher percentage of "thriving" in each of these five areas assessed, showing

the largest percentage difference in social well-being and community well-being. With regards to social well-being, 54% of fraternity and sorority members were thriving, compared to 48% of non-members, showing a 6% difference between the groups. Similarly, in the area of community well-being, 52% of fraternity and sorority members were thriving, compared to 46% of non-members (Gallup, 2014, p. 8). Assessing why these statistics present the way they do, Gallup suggested community well-being could stem from increased exposure to volunteer opportunities in the Greek community. In addition, social well-being can be contributed to strong bonds formed with fellow members and mentors due to involvement in the Greek Life system (Gallup, 2014, p. 8). An heightened sense of well-being in their post-graduate lives could lead members of Greek life to volunteer and give of their time to their community, feeling sound and secure in their personal lives and ready to engage in the community around them.

Statistics from the Gallup study show members of Greek Life are thriving in all areas of well-being, but do not go on further to assess how graduates are interacting with and bettering the communities around them. With 46% of Greek graduates thriving in the area of financial well-being, it could be suggested members would have the opportunity financially to donate money to local or national philanthropic causes (Gallup, 2014, p. 8). Similarly, with a higher well-being in community and social involvement, post-graduate Greeks would be expected to involve themselves in their local communities through volunteer groups or community programs due to their focus on volunteering during college Greek Life membership. However, with little research looking into how graduated Greek Life members use their college learned skills to continue bettering themselves and their community, it is hard to assess exactly how Greek members use their Greek related skills in their profession or community. While research showing Greek members have acquired skills of communication, leadership, community involvement, and



time and money management is abundant, the precise ways they utilize those skills are not articulated in current findings. We know members of Greek Life graduate with an advantage and higher skill set than their unaffiliated peers, how do we continue this upwards momentum through the rest of their lives, fine tuning their abilities to impact their communities, careers, and future well-being?

## **GRAD-PG**

### **Greek-Member Relationships and Development – Post-Graduation**

Focusing on Greek Life members who have graduated and moved on to new post graduate communities, the Greek-Member Relationships and Development – Post-Graduation organization (GRAD-PG) serves as an organization to help graduates better engage in volunteering, philanthropic giving, and personal development. Accounting for the skills Greeks have acquired during their time in college, GRAD-PG fosters a community for graduates to join and continue to use their college learned skills to better the area around them. Research has shown members of Greek Life graduate with a unique skill set, GRAD-PG sets out to continue to build those upon skills and put them to use in any kind of community.

The mission statement of GRAD-PG will be as follows:

Greek-Member Relationships and Development – Post-Graduation is a post graduate organization of Greek Life affiliated people dedicated to the betterment of their communities and themselves through charitable giving, community volunteering, and personal development.

GRAD-PG will serve as a non-profit organization, run solely by Greek Life college graduates in any community where graduated members live. While there is the possibility for many chapters of GRAD-PG to organize around the country, each chapter will act independently of one another

to best serve the community in which it is are located. While individual Greek chapters often have alumni chapters in large cities throughout the country, GRAD-PG will be able to be started in any city or town, regardless of population size or individual Greek organization percentage. GRAD-PG membership will be open to all college graduates who were involved in Greek Life, specific Greek affiliation will not be a requirement for membership, in turn resulting in a heightened opportunity for membership.

Each chapter of GRAD-PG will focus on engaging with community members to establish a local organization for members to volunteer with and a local cause to hold philanthropic events for. Along with engaging in community relations, GRAD-PG will hold events for members to focus on career related skills and areas of personal development. Through holding events such as resume, interview, or conflict management workshop, GRAD-PG members will continue bettering themselves in career related areas. Along with gaining new career skills, GRAD-PG will also serve as a networking opportunity for members.

GRAD-PG will be responsible for involving members in one day of service every two months. After completing a community assessment, the chapter will determine specific organizations in the surrounding area who would benefit from volunteer work. Days of service can involve serving one organization or traveling between multiple organizations, whichever the chapter decides is the best use of their collective time. Along with giving of time and service, GRAD-PG chapters are tasked with raising money for local organizations through philanthropic work. After completing a community need or local organization need assessment, the chapter will be able to determine one organization to raise money for. By holding one philanthropic event per year, GRAD-PG members will continue using skills they learned while in college of philanthropic event planning and community engagement to better a local organization. Similar



to collegiate Greek Life chapters, GRAD-PG will offer members the opportunity to better their community and to better themselves. Recruiting local career development agencies to attend meetings and discuss how to set career goals, how to give your resume a competitive edge, and how to work towards your dream career will further members in their career related skills. In addition, members can assess their own personal needs and hold programs over any number of personal development related areas such as managing finances, investing wisely, or learning how to handle emotions in a healthy way.

Research has proven collegiate Greek Life members learn a multitude of skills while in their organization and graduate with specific and significant advantages when compared to their non-affiliated peers. Through honing in on skills of volunteering, philanthropic giving, and personal development, GRAD-PG chapters aim to better the individual and the community through bringing Greeks together to give back and work on themselves at the same time.

Organizations such as GRAD-PG are not abundant in society, however there are many graduated Greek affiliated members in communities all over the country who could benefit from joining GRAD-PG. Seeing as how GRAD-PG has things to offer to both the local community and Greek Life graduates, the organization would be well received in any town with a specific need and Greek Life graduates looking to continue using skills developed while in college.

### **Forming the Organization**

#### **The First Year**

Once a group of Greek Life graduates gather and embark on forming a GRAD-PG chapter, they will complete the first year as a pilot year for the organization. In the pilot year, they will be considered an unincorporated nonprofit association. An unincorporated nonprofit association is defined as an “unincorporated group of two or more persons joined by mutual

consent for a common lawful purpose, whether organized for profit or not” (Fishman, 2013). During this first year, members will focus on recruiting members, establishing a Board of Directors as defined in the Constitution and Bylaws (Constitution and Bylaws of the Greek-Member Relationships and Development – Post-Graduate Organization), forming a written set of chapter bylaws, and establishing relationships with community organizations for community service and philanthropic giving purposes. After the completion of these tasks and the pilot year, members will embark on establishing their chapter as an incorporated nonprofit organization. The following steps will dictate how to establish the chapter as an incorporated nonprofit organization in the state of Indiana.

### **Incorporating the Chapter**

The state of Indiana outlines the steps involved in filing for nonprofit incorporation status through the Office of Faith-Based and Community Initiatives. The three agencies involved in filing for nonprofit status are the Indiana Secretary of State, the Indiana Department of Revenue, and the Internal Revenue Service. The requirements of each agency, along with the specific forms associated, must be completed to file for nonprofit status (State of Indiana, 2017, s. 3). There are some costs associated with filing the forms, chapters should utilize their budget to pay these costs.

Beginning with the Indiana Secretary of State, chapters must file their Articles of Incorporation. In accordance with Indiana Code 23-17-3-2, Articles of Incorporation must include the following:

- The name of the corporation
- A statement as to whether the corporation is a public, religious, or mutual benefit corporation
- The name and address of the Registered Agent
- The name and address of all the incorporators
- A statement as to whether the corporation will have members



- A statement regarding the distribution of assets upon dissolution

A filing fee of \$30 is associated with filing the Articles of Incorporation (State of Indiana, 2017, s. 4). A copy of this form for Indiana can be found in the appendixes of this document. For the purpose of GRAD-PG, the name of the chapter corporation will be “Greek-Member Relationships and Development – Post-Graduation: (City), (State) Chapter, Incorporated.” As stated in the Constitution and Bylaws, GRAD-PG is a public benefit corporation. The Registered Agent on the Articles of Incorporation will be the chairperson of the chapter. The incorporators on the Articles of Incorporation will be the Board of Directors. GRAD-PG will have members and the distribution of assets upon dissolution will be defined by each chapter individually, as stated in the Constitution and Bylaws.

To obtain an Indiana taxpayer Identification Number and gain sales tax exemption, the chapter must file Form NP-20A with the Indiana Department of Revenue. There is no cost associated with filing this form (State of Indiana, 2017, s. 5). A copy of this form for Indiana can be found in the appendixes of this document. The form is one page long and must be printed out and mailed to the Indiana Department of Revenue. Form NP-20A requires the organization’s name, the purpose of the organization, the organization type, and the federal determination letter from the Internal Revenue Service. Details and steps on how to obtain this letter will follow. To file the form, the chapter will use their chapter corporation name, as stated above. The purpose of the organization can be found in the Constitution and Bylaws and is will be stated on this form. Organization type will be “charitable,” and chapters will mark box B-2. To answer the yes/no questions on Form NP-20A, chapters will not rent or sell personal property for more than 30 days in a calendar year and the chapter does not belong to a parent organization, as each chapter of GRAD-PG acts independently and does not report to a national board.

Organizations seeking nonprofit status must receive an Employer Identification Number (EIN) from the Internal Revenue Service (IRS). The IRS also determines if an organization meets the criteria to become a 501(c)3 tax-exempt organization (State of Indiana, 2017, s. 7). To obtain an EIN, organizations must complete Form SS-4, for which there is no fee. Although GRAD-PG will not have employees, chapters must still obtain an EIN; the IRS uses EIN's as "roughly the corporate equivalent of a Social Security Number, and is used ... for identification purposes" (State of Indiana, 2017, s. 7). A copy of this form for Indiana can be found in the appendixes of this document. GRAD-PG chapters should complete all applicable boxes and use their chapter corporation name. The "type of entity" will be "other nonprofit organization" and "charitable/service organization" should be written in to specify. After filing Form SS-4 and receiving an EIN, chapters can file for 501(c)3 status with the IRS if they so choose. Because the process for receiving tax-exemption is lengthy, can take a few months to receive, has an associate fee of \$750, and is not required to function as a nonprofit organization, chapters are not required to file for this status. If a chapter decides to apply for 501(c)3 status and meets the criteria, the IRS will issue a Determination Letter stating the chapter's status (State of Indiana, 2017, s. 8-9). Filing for 501(c)3 status requires filling out form 1023 and can be found on the IRS website.

Once a chapter has received an incorporated nonprofit organization status, they must stay up to date on yearly filings with the Indiana Secretary of State, the Indiana Department of Revenue, and the Internal Revenue Service. The penalties for not completing yearly filings can range from losing tax-exemption status to not being able to apply for grants to being administratively dissolved (State of Indiana, 2017, s. 13). It is the duty of each chapter and its Board of Directors to ensure filings are completely correctly and in a timely manner. Obtaining

and maintain nonprofit status shall be taken seriously and treated carefully, as chapter members and directors will be held responsible for mistakes and wrongdoings.

### **Conclusion**

GRAD-PG is an organization meant to be established in any size city between any size group of Greek Life graduates. It intends to be a mutually beneficial organization, benefiting the community it is located in through volunteer work and philanthropic donations, and benefiting its members through personal development and career development workshops. GRAD-PG would bring forth new volunteers, minds, and philanthropist in the community in which it's located. Documents essential to forming GRAD-PG are the Constitution and Bylaws, sample membership development programs, and state and federal forms for incorporating the organization. Copies of all of these documents can be found in the appendix of this thesis to ensure consistency and feasibility when creating new GRAD-PG chapters. Based on research and statistics of Greek Life members' and graduates' skills such as volunteering, giving, and career or personal growing, GRAD-PG would be well received by the Greek community and those looking for ways to get involved in their towns and cities. GRAD-PG would provide an outlet for Greek Life graduates to continue using and building upon skills gained in college while socializing and interacting with their community.



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**Constitution and Bylaws**  
**of the**  
**Greek-Member Relationships and Development – Post-Graduation**  
**Organization**

As adopted in May of 2017 in Muncie, Indiana



**Constitution and Bylaws****Table of Contents**

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### **Preamble**

We, the members of Greek-Member Relationships and Development – Post-Graduation (GRAD-PG), accept the Constitution and Bylaws in honor of all graduates of Greek Life who have and will contribute to charitable giving, community volunteering, and personal development, that together we might better seek the betterment of our community and ourselves.

## **Article I**

### **Name**

The name of this organization shall be Greek-Member Relationships and Development – Post-Graduation, shortened to GRAD-PG.

Individual chapter names shall be Greek-Member Relationships and Development – Post-Graduation: (City), (State) Chapter.

## **Article II**

### **Purpose**

The purpose of our organization is to foster a community of Greek Life affiliated people dedicated to the betterment of their communities and themselves through charitable giving, community volunteering, and personal development.

## **Article III**

### **Mission Statement**

Greek-Member Relationships and Development – Post-Graduation is a post graduate organization of Greek Life affiliated people dedicated to the betterment of their communities and themselves through charitable giving, community volunteering, and personal development.

## **Article IV**

### **Organization**

Greek-Member Relationships and Development – Post-Graduation is a corporation organized for purposes other than profit, founded in 2017 and originally incorporated in Muncie, Indiana. It is composed of Greek Life members who have received alumni status from their respective organizations upon graduating from college.

## **Article V**

### **Government**

Government of Greek-Member Relationships and Development – Post-Graduation shall be left to the individual chapters. Greek-Member Relationships and Development – Post-Graduation will not have a national or international governing structure or national or international funds.



## **Article VI**

### **Membership**

Membership of this organization will be open to people who have graduated with a four-year degree, are associated with a Greek Life organization, and have gained alumni status from their organization upon graduation. Members shall meet the individual requirements of their Greek-Member Relationships and Development – Post-Graduation chapters, including but not limited to: paying member dues, attending monthly member meetings, attending community service days, and partaking in the yearly philanthropy project.

## **Article VII**

### **Chapters**

#### Section 1      Membership

All people eligible for membership as defined in Article V of the Constitution and Bylaws shall be granted membership into Greek-Member Relationships and Development – Post-Graduation if they so wish to join. Each Greek-Member Relationships and Development – Post-Graduation chapter will be comprised of these people seeking membership.

#### Section 2      Establishment

Greek-Member Relationships and Development – Post-Graduation chapters shall be established when a group of people eligible for membership decide it is in their and the communities best interest to begin a chapter of the organization. Chapters do not have membership quotas; it is solely the chapter's responsibility to ensure the chapter and its members can continue to function in a capacity worthy of the organization.

Chapters will work independently of one another in order to best serve their members and individual communities. Chapters will be entirely responsible for their own finances and elections process.

#### Section 3      Government

Individual Greek-Member Relationships and Development – Post-Graduation chapters shall be responsible for governing themselves. The structure of individual chapter government will be designed as follows:

##### **A. Chairperson**

The Chairperson shall be tasked with presiding over all Board of Directors meetings and chapter meetings. They shall have general management over the chapter finances and calendar. The Chairperson shall have the general powers and duties allocated to offices of the chairperson in corporations and required

by law or non-profit organizations. The Chairperson is a voting member of the Board of Directors.

B. Coordinator of Finances

The Coordinator of Finances shall preside over the budget and money management of the chapter. The Coordinator of Finance is tasked with attending Board of Directors meetings and acting as a voting member of the Board of Directors. They shall submit a yearly budget for chapter approval and regulate yearly member dues and payments. The Coordinator of Finances is also tasked with keeping Board of Directors meeting minutes and chapter meeting minutes.

C. Coordinator of Philanthropy

The Coordinator of Philanthropy shall preside over the chapter's philanthropy endeavors. They are tasked with attending Board of Directors meetings and are acting as a voting member of the Board of Directors. They shall submit yearly proposals for a philanthropy event for the chapter to conduct. They shall assess community need when deciding a philanthropic organization to support. They shall form committees to aid in planning the event if they see fit.

D. Coordinator of Community Service

The Coordinator of Community Service shall preside over the chapter's community service events and endeavors. They are tasked with attending Board of Directors meetings and are acting as a voting member of the Board of Directors. They shall submit plans for six community service events for the chapter to participate in per year. They shall assess community and organization need in order to best serve the community through acts of service.

E. Coordinator of Membership

The Coordinator of Membership Development shall preside over the chapter's personal and career development programs along with membership recruitment strategies. They are tasked with attending Board of Directors meetings and are acting as a voting member of the Board of Directors. They shall complete one personal or career development related workshop or informational presentation to be presented at each chapter meetings. They shall form committees to aid in membership recruitment when they see fit.

Chapters shall hold elections once every year, with individual term limits set at three years. A quorum of two thirds of members present must be met in order to hold chapter elections. A majority vote will elect each governing position.

The Chairperson and four Coordinators shall be the "Board of Directors" for the chapter. No member of the chapter shall receive compensation for their services to the chapter, including but not limited to members of the Board of Directors.



## **Article VIII**

### **Members**

#### Section 1      Qualifications for Membership

Members shall be graduates of a four-year college with alumni status from their respective Greek Life organizations. People affiliated with Greek-Life who became members through forms of alumni initiation shall also be eligible for membership. Members shall be interested in pursuing relationships with their community and Greek Life peers through volunteering, philanthropy, and personal development. Members shall be dedicated to Greek-Member Relationships and Development – Post-Graduation through involvement in community service days, philanthropic event work, and personal development.

#### Section 2      Members in Good Standing

To remain in good standing with a Greek-Member Relationships and Development – Post-Graduation chapter, a member must meet all of the following requirements:

- A. Attendance at monthly chapter meetings
- B. Attendance at chapter community service days  
Chapters will hold one service day every two months
- C. Involvement in chapter philanthropy event  
Chapters will hold one large philanthropic event per year
- D. Pay yearly membership dues

#### Section 3      Membership Termination

Members who are not in good standing with their chapter will be informed of their delinquency by written notice in the form of an email from the chapter Chairperson. The member will then have 30 days to regain good standing by paying their dues, if it is the outstanding requirement, or petitioning the reason for their absence from an event with the Board of Directors.

Members who do not correct their delinquency within 30 days can be removed from the chapter by a four-fifths vote of the Board of Directors. The vote for removal will be conducted after the member has the opportunity to appear before the Board of Directors in person and provide a testimony on their behalf.



## Article IV Organization Dues

### Section 1      Yearly Budget

Once per fiscal year, the Coordinator of Finances shall submit a budget to the Board of Directors for review and to the chapter for final approval. Chapter fiscal years shall end in June. Budget items and dollars allocated will vary by chapter, however these main components must be included in every chapter budget:

A. Chapter Operations Budget

This budget must be used for general expenses and operations of the chapter. If chapters must pay for or rent the space in which they meet, the chapter must allocate appropriate chapter funds to do so. If the chapter proceeds with incorporation after the pilot year, appropriate funds to do so shall be allocated to this budget.

B. Membership Development Budget

Chapters must allocate appropriate funds to bring in guest speakers and programs for personal and career development programs.

C. Recruitment Budget

Chapters may use this budget section to fund marketing and promotional material.

D. Philanthropy Budget

Chapters must track all philanthropy spending and fundraising in this budget section.

### Section 2      Member Dues

Member Dues must be defined and distributed to members two months prior to the due date. Dues may be paid in full or paid in installments. Installment payment plans are to be dictated by individual chapter Coordinators of Finances. Member Dues are to fully fund the yearly chapter budget.

### Section 3      First Year Member Dues

First year members of Greek-Member Relationships and Development – Post-Graduation will be assessed a one-time fee of \$100, added onto their yearly member dues, in order to initiate them with the chapter. After their first year, all members will pay the same yearly dues.

**Article X**  
Dissolution

Shall a chapter fold, expectedly or unexpectedly, all monies and assets belonging to the chapter shall be donated to the most recent philanthropic cause the chapter has decided to support.

**Article XI**  
Saving Clause

If any part of the Constitution and Bylaws is found to be illegal or invalid, such illegal or invalid part(s) will be disregarded and the remainder of the Constitution and Bylaws will remain in full force and effect.

## Appendix: Personal Development Programs

### **Program Title: Learning from Failure**

#### **Tips for the Facilitator:**

Use this guide to create a presentation, discussion hand-outs, or a structured talk around the topic of failure. Review the materials before the program and add or take out any necessary items. Cater this program to the chapter and its members.

Items in italics should be read aloud by the facilitator.

If including or expanding the discussion on *Grit*, consider buying every member a copy of the book and encouraging them to read it prior to the program.

#### **Chickering Vectors Considered:**

Vector 2: Managing Emotions

Vector 6: Developing Purpose

Vector 7: Developing Integrity

#### **Content References:**

*Alpha Phi Leadership Initiative – Chapter Leadership Development* by Alpha Phi International Fraternity

*Grit Scale Survey* by Angela Duckworth

*Grit: The Power of Passion & Perseverance* by Angela Duckworth

*Grit: The Power of Passion and Perseverance* TED Talk by Angela Duckworth

*Merriam-Webster Dictionary* – Definition of failure

*Success, Failure, and the Drive to Keep Creating* TED Talk by Elizabeth Gilbert

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### **Program Facilitator Guide: Estimated 1 Hour**

#### **What do we think failure is? – 5 minutes**

Lead an informal discussion on the general topic of failure. If necessary, take notes on a white board or large flipchart.

Ask general questions such as:

- *What is the first word that comes to mind when we think of failure?*
- *How do you know or think you have failed?*
- *Do we view failure with a positive or negative connotation?*
- *Do you think success and failure are closely linked? Do they go hand in hand?*



State the Merriam-Webster Dictionary definition for failure and discuss if this is a definition the group accepts and can use for the remainder of the program. If not, modify the definition to what members agree upon.

- a. *omission of occurrence or performance; specifically: a failing to perform a duty or expected action*
- b. *a lack of success*
- c. *a falling short*

### **Why do we avoid failure? – 5 minutes**

Read and discuss these ideas with members. Lead a group discussion or break into smaller groups if needed:

*Failure makes us feel uncomfortable and upset. Public failure makes us feel ashamed and embarrassed. Think about how you feel when you see someone else fail. Do you feel second hand embarrassment? Why do we place so much of our personal worth on success both in and outside of the workplace?*

### **Personal experience on failure – 10 minutes**

Have members group up or work independently on categorizing their own experiences with failure. Ask members to reflect on questions such as:

- *Did they fail themselves? Others? An organization?*
- *What is harder for them, failing on their own or failing with a group?*
- *Does failing publicly versus privately make a difference in how they feel?*
- *What did they do when they realized they had failed and in the days/weeks/months following?*

### **Find your way back home – 20 minutes**

Show the TED Talk:

Elizabeth Gilbert: Success, failure, and the drive to keep creating  
[https://www.ted.com/talks/elizabeth\\_gilbert\\_success\\_failure\\_and\\_the\\_drive\\_to\\_keep\\_creating](https://www.ted.com/talks/elizabeth_gilbert_success_failure_and_the_drive_to_keep_creating)

Have members group up or work independently to answer the following questions:

- *Where is your "home?"*
- *Have you ever been at the very end of the "failure" or the "success" spectrum? Have you been at both ends?*
- *In the past, what have you done to get back "home?" Was what you did good and healthy?*
- *What are the healthy steps you can take in the future, when you find yourself at either end of the spectrum, to get back "home?"*

### **Grit: The Power of Passion & Perseverance by Angela Duckworth – 20 minutes**

If your chapter read the book *Grit*, lead a book discussion on what members thought and took away from the book.

If your chapter did not read the book, perhaps watch the TED Talk *Grit: The power of passion and perseverance* by Angela Duckworth prior to discussion the idea and notion of “grit.” The Ted Talk can be found at [https://www.ted.com/talks/angela\\_lee\\_duckworth\\_grit\\_the\\_power\\_of\\_passion\\_and\\_perseverance](https://www.ted.com/talks/angela_lee_duckworth_grit_the_power_of_passion_and_perseverance)

After thoughts and ideas about the book/TED Talk have been exchanged, have members take the survey “Grit Scale” on Angela Duckworth’s website. The survey can be found at <http://angeladuckworth.com/grit-scale/>

Have members discuss and reflect upon their score. Send members home thinking about the following questions:

- *Do I value the grit I have in the workplace? In other areas of my life?*
- *Are there things I could do to improve my grit? Can I be consciously aware of my grit?*
- *Could I utilize an accountability partner to help me stay “gritty?”*

## **Program Title: Building a Personal and Digital Brand**

### **Tips for the Facilitator:**

Use this guide to create a presentation, discussion hand-outs, or a structured talk around the topic of failure. Review the materials before the program and add or take out any necessary items. Cater this program to the chapter and its members. Bring paper and pens for everyone to use during the session.

Items in italics should be read aloud by the facilitator.

### **Chickering Vectors Considered:**

Vector 5: Establishing Identity

Vector 6: Developing Purpose

Vector 7: Developing Integrity

### **Content References:**

*Alpha Phi Leadership Initiative – Chapter Leadership Development* by Alpha Phi International Fraternity

*The Ultimate Personal Branding Checklist for Entrepreneurs* by Brittney Lopez –Branded by Britt

*The Personal Brand of You* TEDx Talk by Rob Brown

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## **Program Facilitator Guide: Estimated**

### **What is a personal brand? – 5 minutes**

Lead an informal discussion with members on personal brand. You can begin by asking some of the following questions or coming up with your own:

- *How would you define someone's personal brand?*
- *What is closely tied to your personal brand?*
- *What would you consider the personal brand of someone famous, like Oprah?*
- *Do you think personal brands just happen, or can they be changed and formed?*

### **Consider your personal brand – 10 minutes**

Have members get into groups of three and pass out pieces of paper and pens. Instruct members to write down words that they think define them and their personal brand. After everyone has written a few words, have group members exchange papers. Group members will then write words that they think of when thinking of the other person's personal brand. After papers have been passed around for each group member to write on, have papers return to the original person they belonged to. A sample of a handout for this activity can be found at the end of this guide.

Take time to have members look at what others commented about them. If necessary, have groups discuss why they wrote what they wrote. Often, there a piece of our personal brand we don't see and sometimes we don't give ourselves enough credit!



### **Where does your personal brand come from? – 15 minutes**

Watch the Rob Brown *The Personal Brand of You* TEDx Talk. The talk can be found at <https://www.youtube.com/watch?v=rGbsb6aXbzc>

Start the video at 11:20 to cut down on time. While the video is playing, invite members to write down ideas of what they think makes up their character, competence, personal brand, and reputation. Continue writing after the video if needed.

### **Your branding checklist – Make your brand! – 30 minutes**

Utilize *The Ultimate Personal Branding Checklist for Entrepreneurs* by Brittney Lopez. You can find a copy of the list at <http://www.brandedbybritt.co/ultimate-branding-checklist/>. Convert the list into a PowerPoint presentation or pass out condensed copies to members.

Begin with having members write down their personal “why” statements. This can look like a business mission statement or their personal life goals. Instruct members to think about their talents and uniqueness when constructing their “why.”

Establish and write down personal brand values. What do you stand for? What don’t you stand for? What kinds of core values align with you and your “why” statement?

Think about branding with regards to one of the following areas: digital media, resumes, or emails. Have members reflect on the following questions:

- *Does it reflect your personality and your uniqueness?*
- *Is your business card Times New Roman font, or is it something that speaks to your personality and character?*
- *Does your resume stand out above the rest in qualifications and appearance? Is it easy to read and digest? Is it pleasing to the eye?*
- *Does your email font and signature reflect your brand?*

Have members group up and assess one another’s digital media and branding. Are people being cohesive? Is one font and color scheme carried throughout? Instruct members to provide constructive tips for each other when it comes to the appearance of their digital brand.

### **The take away – 5 minutes**

Send members home with a clear mission – to evaluate and build upon their personal and digital brand! Read the following to members:

*Right now, we all might be at varying stages in the process of branding, some of us might need to continue working on our “why” statements and assessing what we want our brand to be, others might need to update a couple of fonts and color schemes. But it is OK to be at different stages in the process! A personal brand is ever changing and evolving with you, it will always be a work in progress and something you tweak and revisit over time.*

Send members home with the papers and resources used in the session so they can continue on the path of building their personal brand.

**Consider your personal brand – Handout**

Name: \_\_\_\_\_

Words that define my personal brand:

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Group member one: \_\_\_\_\_

Words that come to mind when I think of this person's personal brand:

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Group member two: \_\_\_\_\_

Words that come to mind when I think of this person's personal brand:

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Group member three: \_\_\_\_\_

Words that come to mind when I think of this person's personal brand:

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# ARTICLES OF INCORPORATION FOR A NONPROFIT CORPORATION

State Form 4162 (R13 / 5-14) Corporate Form No. 364-1 (October 1984)

Approved by State Board of Accounts, 2014

CONNIE LAWSON  
SECRETARY OF STATE  
BUSINESS SERVICES DIVISION  
302 W. Washington Street, E018  
Indianapolis, IN 46204  
Telephone: (317) 232-6576

- INSTRUCTIONS:**
1. Use 8 1/2" x 11" white paper for attachments.
  2. Present original and one copy to the address in the upper right corner of this form.
  3. Please TYPE or PRINT in INK.
  4. Please visit our office at [www.sos.in.gov](http://www.sos.in.gov).
  5. Make check or money order payable to Secretary of State.

Indiana Code 23-17-3-2

**FILING FEE: \$30.00**

- NOTES:**
1. Nonprofit corporations must qualify with the Internal Revenue Service and the Indiana Department of Revenue. It is strongly suggested you do not complete or file this form before contacting both agencies.
  2. Article VII must be completed appropriately. Please see (1) above.

## ARTICLES OF INCORPORATION

The undersigned, desiring to form a Corporation (hereinafter referred to as the "Corporation") pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991 (hereinafter referred to as the "Act"); execute the following Articles of Incorporation:

### ARTICLE I - NAME AND PRINCIPAL OFFICE

Name of the Corporation: *(The name must include the word Corporation, Incorporated, Limited, Company or an abbreviation thereof.)*

Address of Principal Office (number and street)

City

State

ZIP code

### ARTICLE II - PURPOSE

The purposes for which the Corporation is formed are:

**Specific language is required by the IRS in this article in order to be approved for 501(c) status. Contact the IRS for assistance.**

### ARTICLE III - TYPE OF CORPORATION (CHECK ONLY ONE)

The Corporation is a:

- ☐ public benefit corporation, which is organized for a public or charitable purpose;  
☐ religious corporation, which is organized primarily or exclusively for religious purposes; or  
☐ mutual benefit corporation (*all others*).

### ARTICLE IV - REGISTERED AGENT AND REGISTERED OFFICE

Registered Agent: The name and street address of the Corporation's Registered Agent and Registered Office for service of process are:

Name of Registered Agent (*cannot be the corporation itself.*)

Address of Registered Office (number and street) (**PO Box not accepted**)

City

State

ZIP code

**IN**

**Required:**

- ☐ By checking the box, the Signator(s) represents that the registered agent named in the application has consented to the appointment of registered agent.

### ARTICLE V - MEMBERSHIP

Indicate if Corporation will have members:

☐ Yes ☐ No

(Continued on the reverse side)



**ARTICLE VI - INCORPORATOR(S)**  
**(INCORPORATORS MAY NEVER BE AMENDED)**

Name(s) and address(es) of the incorporator(s) is/are as follows:

Name	Number and Street or Building	City	State	ZIP code

**ARTICLE VII - DISTRIBUTION OF ASSETS ON DISSOLUTION OR FINAL LIQUIDATION**

Refer to Indiana Code 23-17-22-5 for permitted activities following Dissolution:

*Specific language is required by the IRS in this article in order to be approved for 501(c) status. Contact the IRS for assistance.*

\* Please note this section must be completed.

**ARTICLE VIII - INCORPORATOR(S)**  
**(INCORPORATORS MAY NEVER BE AMENDED)**

In witness whereof, the undersigned incorporator(s) of said Corporation execute(s) this document, and verify(ies) subject to penalties of perjury that the facts contained herein are true this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Signature	Printed name
Signature	Printed name
Signature	Printed name

This instrument was prepared by: (name)

Address (number and street or building)	City	State	ZIP code
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**NP-20A**State Form 51064  
(R2 / 10-10)Indiana Department of Revenue  
**Nonprofit Application for  
Sales Tax Exemption**  
NO FEE REQUIRED.**Part I**

Full Name of Organization		This Area for Department Use Only	
			Type
Street Address			
City, State, Zip Code		County	
		Indiana Taxpayer Identification Number	Federal Identification Number
Date Incorporated or Formed:	Enter the Month Your Accounting Period Ends:		
What is the predominant purpose of your organization?			

**Part II**

1. Indicate type of qualifying organization named in I.C. 6-2.5-5-21 (Check only one box in A, B, or C).
- A. Organized specifically as a:
- |                                       |  |   |  |
|---------------------------------------|--|---|--|
| <input type="checkbox"/> (1) Church   | <input type="checkbox"/> (3) Monastery/Convent | <input checked="" type="checkbox"/> (5) Departmental Use Only | <input type="checkbox"/> (7) Pension Trust   |
| <input type="checkbox"/> (2) Hospital | <input type="checkbox"/> (4) Parochial School  | <input type="checkbox"/> (6) Labor Union                      | <input type="checkbox"/> (8) Veteran's Group |
- B. Organized and operated for one of the following reasons:
- |   |   |  |   |
|---|---|--|---|
| <input type="checkbox"/> (1) Religious  | <input type="checkbox"/> (3) Scientific | <input type="checkbox"/> (5) Educational | <input type="checkbox"/> (7) VEBA                         |
| <input type="checkbox"/> (2) Charitable | <input type="checkbox"/> (4) Literary   | <input type="checkbox"/> (6) Civic       | <input type="checkbox"/> (8) Student Co-operative Housing |
- C. Organized and operated as one of the following entities:
- |  |   |   |
|--|---|---|
| <input type="checkbox"/> (1) Fraternal (including fraternal beneficiary societies) | <input checked="" type="checkbox"/> (2) Departmental Use Only | <input type="checkbox"/> (4) Business Association |
|  | <input type="checkbox"/> (3) Business League                  |   |
2. Does your organization sell or rent personal property for more than 30 days in a calendar year? ☐ No ☐ Yes
3. Is this organization a local affiliate of a national or parent organization? ☐ No ☐ Yes--If so enter name and address of national or parent organization.
4. Has this organization previously applied for Indiana exempt status? ☐ No ☐ Yes--If so, please indicate previous registration number.

**IMPORTANT --Attach the following documents.**

Copy of federal determination letter (ruling from the Internal Revenue Service) showing the section of the Internal Revenue Code exemption from federal tax has been granted. To obtain a copy of federal determination letter or to apply for federal exemption, contact the IRS at: 1-877-829-5500

**Mail To:**

Indiana Department of Revenue  
Tax Administration  
P.O. Box 7206  
Indianapolis, IN 46207-7206  
(317) 232-0129

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and I have examined this application, including the accompanying statements, and to the best of my knowledge it is true, correct and complete.

Name of Person(s) to Contact	Daytime Telephone Number(s)	Email Address
Signature	Title	Date Signed

**Note:** Form SS-4 begins on the next page of this document.

### Change to Fax-TIN Numbers

There is a change to the Instructions for Form SS-4 (Rev. February 2016). On page 2, under the **"Where to File or Fax"** table, the Fax-TIN numbers have changed.

<b>If you have a principal place of business, office or agency, or legal residence in the case of an individual, located in:</b>	<b>File or Fax to:</b>
One of the 50 states or the District of Columbia	Internal Revenue Service Attn: EIN Operation Cincinnati, OH 45999 Fax: (855) 641-6935
If you have no legal residence, principal place of business, or principal office or agency, in any state:	Internal Revenue Service Attn: EIN Operation Cincinnati, OH 45999 Fax: (855) 215-1627 (within the U.S.) Fax: (304) 707-9471 (outside the U.S.)

These changes will be included in the next revision of the Instructions for Form SS-4.



# Application for Employer Identification Number

(For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)

OMB No. 1545-0003

EIN

▶ See separate instructions for each line.

▶ Keep a copy for your records.

Type or print clearly.

1 Legal name of entity (or individual) for whom the EIN is being requested		
2 Trade name of business (if different from name on line 1)	3 Executor, administrator, trustee, "care of" name	
4a Mailing address (room, apt., suite no. and street, or P.O. box)	5a Street address (if different) (Do not enter a P.O. box.)	
4b City, state, and ZIP code (if foreign, see instructions)	5b City, state, and ZIP code (if foreign, see instructions)	
6 County and state where principal business is located		
7a Name of responsible party	7b SSN, ITIN, or EIN	
8a Is this application for a limited liability company (LLC) (or a foreign equivalent)? <input type="checkbox"/> Yes <input type="checkbox"/> No		8b If 8a is "Yes," enter the number of LLC members ▶
8c If 8a is "Yes," was the LLC organized in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No		
9a Type of entity (check only one box). <b>Caution.</b> If 8a is "Yes," see the instructions for the correct box to check.		
<input type="checkbox"/> Sole proprietor (SSN) <input type="checkbox"/> Estate (SSN of decedent)		
<input type="checkbox"/> Partnership <input type="checkbox"/> Plan administrator (TIN)		
<input type="checkbox"/> Corporation (enter form number to be filed) ▶ <input type="checkbox"/> Trust (TIN of grantor)		
<input type="checkbox"/> Personal service corporation <input type="checkbox"/> National Guard <input type="checkbox"/> State/local government		
<input type="checkbox"/> Church or church-controlled organization <input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government/military		
<input type="checkbox"/> Other nonprofit organization (specify) ▶ <input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises		
<input type="checkbox"/> Other (specify) ▶ Group Exemption Number (GEN) if any ▶		
9b If a corporation, name the state or foreign country (if applicable) where incorporated	State	Foreign country
10 Reason for applying (check only one box)		
<input type="checkbox"/> Started new business (specify type) ▶ <input type="checkbox"/> Banking purpose (specify purpose) ▶		
<input type="checkbox"/> Hired employees (Check the box and see line 13.) <input type="checkbox"/> Changed type of organization (specify new type) ▶		
<input type="checkbox"/> Compliance with IRS withholding regulations <input type="checkbox"/> Purchased going business		
<input type="checkbox"/> Other (specify) ▶ <input type="checkbox"/> Created a trust (specify type) ▶		
<input type="checkbox"/> Created a pension plan (specify type) ▶		
11 Date business started or acquired (month, day, year). See instructions.		12 Closing month of accounting year
13 Highest number of employees expected in the next 12 months (enter -0- if none). If no employees expected, skip line 14.		14 If you expect your employment tax liability to be \$1,000 or less in a full calendar year and want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability generally will be \$1,000 or less if you expect to pay \$4,000 or less in total wages.) If you do not check this box, you must file Form 941 for every quarter. <input type="checkbox"/>
Agricultural	Household	Other
15 First date wages or annuities were paid (month, day, year). <b>Note.</b> If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year) ▶		
16 Check <b>one</b> box that best describes the principal activity of your business.		
<input type="checkbox"/> Construction <input type="checkbox"/> Rental & leasing <input type="checkbox"/> Transportation & warehousing <input type="checkbox"/> Health care & social assistance <input type="checkbox"/> Wholesale-agent/broker		
<input type="checkbox"/> Real estate <input type="checkbox"/> Manufacturing <input type="checkbox"/> Finance & insurance <input type="checkbox"/> Accommodation & food service <input type="checkbox"/> Wholesale-other <input type="checkbox"/> Retail		
<input type="checkbox"/> Other (specify) ▶		
17 Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided.		
18 Has the applicant entity shown on line 1 ever applied for and received an EIN? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If "Yes," write previous EIN here ▶		
Third Party Designee	Complete this section <b>only</b> if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of this form.	
	Designee's name	Designee's telephone number (include area code)
	Address and ZIP code	Designee's fax number (include area code)
Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.		Applicant's telephone number (include area code)
Name and title (type or print clearly) ▶		Applicant's fax number (include area code)
Signature ▶		Date ▶



## Do I Need an EIN?

File Form SS-4 if the applicant entity does not already have an EIN but is required to show an EIN on any return, statement, or other document.<sup>1</sup> See also the separate instructions for each line on Form SS-4.

IF the applicant...	AND...	THEN...
Started a new business	Does not currently have (nor expect to have) employees	Complete lines 1, 2, 4a-8a, 8b-c (if applicable), 9a, 9b (if applicable), and 10-14 and 16-18.
Hired (or will hire) employees, including household employees	Does not already have an EIN	Complete lines 1, 2, 4a-6, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10-18.
Opened a bank account	Needs an EIN for banking purposes only	Complete lines 1-5b, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Changed type of organization	Either the legal character of the organization or its ownership changed (for example, you incorporate a sole proprietorship or form a partnership) <sup>2</sup>	Complete lines 1-18 (as applicable).
Purchased a going business <sup>3</sup>	Does not already have an EIN	Complete lines 1-18 (as applicable).
Created a trust	The trust is other than a grantor trust or an IRA trust <sup>4</sup>	Complete lines 1-18 (as applicable).
Created a pension plan as a plan administrator <sup>5</sup>	Needs an EIN for reporting purposes	Complete lines 1, 3, 4a-5b, 9a, 10, and 18.
Is a foreign person needing an EIN to comply with IRS withholding regulations	Needs an EIN to complete a Form W-8 (other than Form W-8ECI), avoid withholding on portfolio assets, or claim tax treaty benefits <sup>6</sup>	Complete lines 1-5b, 7a-b (SSN or ITIN optional), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Is administering an estate	Needs an EIN to report estate income on Form 1041	Complete lines 1-6, 9a, 10-12, 13-17 (if applicable), and 18.
Is a withholding agent for taxes on non-wage income paid to an alien (i.e., individual, corporation, or partnership, etc.)	Is an agent, broker, fiduciary, manager, tenant, or spouse who is required to file Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	Complete lines 1, 2, 3 (if applicable), 4a-5b, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Is a state or local agency	Serves as a tax reporting agent for public assistance recipients under Rev. Proc. 80-4, 1980-1 C.B. 581 <sup>7</sup>	Complete lines 1, 2, 4a-5b, 9a, 10, and 18.
Is a single-member LLC	Needs an EIN to file Form 8832, Classification Election, for filing employment tax returns and excise tax returns, or for state reporting purposes <sup>8</sup>	Complete lines 1-18 (as applicable).
Is an S corporation	Needs an EIN to file Form 2553, Election by a Small Business Corporation <sup>9</sup>	Complete lines 1-18 (as applicable).

<sup>1</sup> For example, a sole proprietorship or self-employed farmer who establishes a qualified retirement plan, or is required to file excise, employment, alcohol, tobacco, or firearms returns, must have an EIN. A partnership, corporation, REMIC (real estate mortgage investment conduit), nonprofit organization (church, club, etc.), or farmers' cooperative must use an EIN for any tax-related purpose even if the entity does not have employees.

<sup>2</sup> However, do not apply for a new EIN if the existing entity only (a) changed its business name, (b) elected on Form 8832 to change the way it is taxed (or is covered by the default rules), or (c) terminated its partnership status because at least 50% of the total interests in partnership capital and profits were sold or exchanged within a 12-month period. The EIN of the terminated partnership should continue to be used. See Regulations section 301.6109-1(d)(2)(iii).

<sup>3</sup> Do not use the EIN of the prior business unless you became the "owner" of a corporation by acquiring its stock.

<sup>4</sup> However, grantor trusts that do not file using Optional Method 1 and IRA trusts that are required to file Form 990-T, Exempt Organization Business Income Tax Return, must have an EIN. For more information on grantor trusts, see the Instructions for Form 1041.

<sup>5</sup> A plan administrator is the person or group of persons specified as the administrator by the instrument under which the plan is operated.

<sup>6</sup> Entities applying to be a Qualified Intermediary (QI) need a QI-EIN even if they already have an EIN. See Rev. Proc. 2000-12.

<sup>7</sup> See also *Household employer* on page 4 of the instructions. **Note.** State or local agencies may need an EIN for other reasons, for example, hired employees.

<sup>8</sup> See *Disregarded entities* on page 4 of the instructions for details on completing Form SS-4 for an LLC.

<sup>9</sup> An existing corporation that is electing or revoking S corporation status should use its previously-assigned EIN.